

# Standard Operating Procedure

## 07 - Standing Work Order

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### A. Purpose

This process documents the steps taken to facilitate the entry of a Standing Work Order through the Standing Work Order form.

### B. Responsibilities

The following Departments participate in this process and are tasked with the following responsibilities:

➤ **Maintenance Manager**

The Maintenance Manager is responsible for entering, tracking, and managing the Standing Work Order entered through CAMIS.

➤ **Technician/Maintenance Worker**

The Technician/Maintenance Worker are responsible for performing the work detailed through the Standing Work Order, charging labor & material against the Standing Work Order and reporting.

➤ **Business or Finance Office, if applicable**

The Business or Finance Office is responsible for processing the Purchase Requisition necessary to facilitate the work detailed through the Standing Work Order.

### C. Process Overview

#### ***Maintenance Manager***

Step 1: The need for a Standing Work Order is identified.

Step 2: A determination is made whether the Standing Work Order is in the system.

Step 3: The Standing Work Order is created.

Step 4: A determination is made whether there is a need to purchase materials.

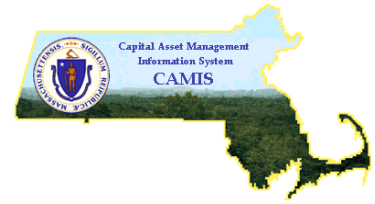
Step 5: The work is assigned.

#### ***Technician/Maintenance Worker***

Step 6: Work is performed.

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Step 7: Labor & materials are charged against the Standing Work Order.

***Business or Finance Office, if applicable***

Step 8: Purchase Requisition is created for purchasing materials.

Step 9: Requisition is forwarded to Purchasing.

Step 10: Purchase Requisition is processed.

Step 11: Purchase Order information is forwarded.

Step 12: Materials are received.

Step 13: Vendor is invoiced for purchased materials.

### D. Process Steps

***Maintenance Manager:***

Note: You can use your mouse or the TAB key to navigate through the forms.

***Step 1: The need for a Standing Work Order is identified.***

- Access the Standing Work Order Form by clicking on the form in the Navigator. (*WORK ORDERS/STANDING WORK ORDERS*)
  - ❑ Enter Query mode (*F11*)
  - ❑ Enter description of work. (*64 characters can be entered*)
  - ❑ Execute Query (*CTRL/F11*)
  - ❑ Cancel Query (*Query/Cancel*)

***Step 2: A determination is made whether the Standing Work Order is in the system.***

- ❑ [YES] Material availability is determined
- ❑ [NO] Standing Work Order is created

***Step 3: The Standing Work Order is created.***

- ❑ Enter Data Entry Mode (*Record/Insert*)
- ❑ [TAB] out of the SWO number (*CAMIS automatically creates the SWO number*)
- ❑ Enter description of work. (*64 characters can be entered*)

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### **General Information**

- ☐ Enter Status = ACTIVE (*Use the List of Values, CTRL/L if needed*)
- ☐ Enter Maintenance Type
  - ROUTINE (repetitive maintenance work)
  - ADMIN (overhead functions such as meetings)
  - CUST SERV (work requested in addition to service level agreement)
- ☐ Enter Assigned To (*Use the List of Values, CTRL/L if needed*)
- ☐ Enter Method (*Use the List of Values, CTRL/L if needed*)
- ☐ Enter Department (*Use the List of Values, CTRL/L if needed*)
- ☐ Enter Crew (*Use the List of Values, CTRL/L if needed*)
- ☐ Enter Craft (*Use the List of Values, CTRL/L if needed*) (Optional)

### **Location Information**

- ☐ Enter Site (*Use the List of Values, CTRL/L if needed*)
- ☐ Enter Building (*Use the List of Values, CTRL/L if needed*)
- ☐ Enter Floor (*Use the List of Values, CTRL/L if needed*)
- ☐ Enter Room (*Use the List of Values, CTRL/L if needed*)

### **Enter Billing Information**

- Access the Billing Window by clicking on the [BILLING] button from the Standing Work Order Form.
  - ☐ Select Billing Method
    - ACTUALS (*Account Numbers required*)
    - ESTIMATE (*Account Numbers required*)
    - NO CHARGE (*Account Numbers not required*)
  - ☐ Select Markup Code (*Use List of Values, CTRL/L if needed*)
  - ☐ Select the Account Numbers to Charge (*Use the List of Values, CTRL/L*)
  - ☐ If Account Numbers are not available, new values can be entered. Please contact your local Business Coordinator
    - Account Number: Enter Account Number up to 8 characters, (*Use the List of Values, CTRL/L if needed*)
    - Subsidiary: Enter Subsidiary up to 2 characters, (*Use the List of Values, CTRL/L if needed*)
    - Object Code: Enter Object Code up to 3 characters, (*Use the List of Values, CTRL/L if needed*)
    - Activity Code (not mandatory): Enter Activity Code up to 4 characters, (*Use the List of Values, CTRL/L if needed*)

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- Close Billing Window by clicking on X in upper right hand corner.

### **Task Information**

- ☐ Enter the Task list (*6000 characters can be entered*)
- Close the Standing Work Order Form by clicking on the X in the upper right hand corner

### **Step 4: A determination is made whether there is a need to purchase materials.**

- ☐ [YES] Material is purchased through the Business or Finance Office
- ☐ [NO] Standing Work Order is assigned

### **Step 5: The work is assigned.**

- ☐ Shops/Trades are notified by Facility Manager of new Standing Work Order

### **Technician/Maintenance Worker**

### **Step 6: Work is performed.**

- Work is performed based on detailing on the Standing Work Order

### **Step 7: Labor & materials are charged against the Standing Work Order.**

### **Labor entry**

- Access the Labor Charges Form by clicking on the form in the Navigator. (*JOB COSTING/LABOR*)
  - ☐ Enter Employee ID (*Use the List of Values, CTRL/L, if needed*)
    - Enter Query mode
    - Enter Employee Name, Crew or Craft or Employee ID
    - Execute Query
    - Select Employee by clicking on [OK] button
  - ☐ Enter Labor Period
    - W (Weekly)
    - D (Daily)
  - ☐ Enter Work Date and [TAB] twice
  - ☐ Enter Standing Work Order Number (*Use the List of Values, CTRL/L, if needed*)
    - Select Standing Work Order
    - Enter Query mode

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- Enter Site, Building, Description, Type, Assigned To, Method or SWO number
- Execute Query
- Select Standing Work Order by clicking on [OK] button
- Enter Hours worked
- Enter labor description (*200 characters can be entered, if needed*)
- Repeat the process for additional work
- Click on [SAVE /RESTART] to add record and insert new record
- Close the Labor Charges Form by clicking on X in upper right hand corner (*CAMIS will automatically save the record and close the form*)

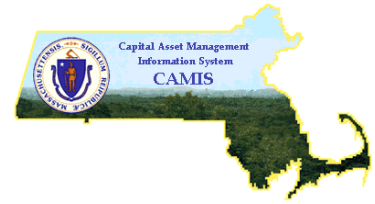
### **Material Entry**

- Access the Material Charges Form by clicking on the form in the Navigator. (*JOB COSTING/MATERIAL CHARGES*)
  - Enter the Standing Work Order Number (*Use the List of Values, CTRL/L, if needed*)
    - Select Standing Work Order
    - Enter Query mode
    - Enter Site, Building, Description, Type, Assigned To, Method or SWO number
    - Execute Query
    - Select Standing Work Order by clicking on [OK] button
  - Enter Part Number (*10 characters can be entered*) (*Use the List of Values, CTRL/L, if needed*)
  - Enter Issue Date
  - Enter Issued To (*Employee ID*)
  - Enter UM (*Unit of Measure*)
  - Enter Quantity
  - Enter Price
  - Amount will be automatically calculated by CAMIS based on Qty and Price
- Close the Material Charges Form by clicking on the X in upper right hand corner

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### ***Business or Finance Office***

***Step 8: Purchase Requisition is created for purchasing materials.***

***Step 9: Requisition is forwarded to Purchasing***

***Step 10: Purchase Requisition is processed.***

***Step 11: Purchase Order information is forwarded.***

***Step 12: Materials are received***

***Step 13: Vendor is invoiced for purchased materials***

### **E. Document Control**

Questions, suggestions, and corrections should be forwarded to [CAMIS.helpdesk@state.ma.us](mailto:CAMIS.helpdesk@state.ma.us).

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### F. Process Flow

